Guide

for School Board Planning and Results Reporting

February 2001

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LEARNING

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Alberta Learning, February 2001

I. Introduction

This guide has been developed to assist Alberta's school boards and schools in preparing, updating and reporting on their three-year education plans. While previous editions of the guide have focused on year-to-year changes and requirements, this new guide has separated general information for long-term use from requirements. The general information is provided in Sections I to IV. Links are provided to specific provincial requirements in Section V. These are reviewed each year. Related reference materials are in the Appendix, Section VI.

The guide is intended for school boards and schools in Alberta. However, because it embodies good planning and reporting principles, it can be used by any organization that seeks to plan its goals, measure its progress and communicate its achievements.

II. Planning and Reporting Overview

Planning and reporting by school boards and schools throughout Alberta are carried out within government's Accountability Framework. This framework is an ongoing cycle that enables continuous improvement and critical reflection by:

- measuring progress, setting priorities and using results to continually improve education for students;
- incorporating provincial direction and community input; and
- communicating with stakeholders (provincial government, staff, parents, public) about school board and school directions and results.

Accountability Cycle for Continuous Improvement in Alberta's Basic Learning System

- School Board 3-Year Plans
- Annual Budget
- Allocations to Programs and Schools
Implementation
Local Priorities for Improvement
- Annual Results Reporting
- Audited Financial Statement
- Provincial Annual Results Reporting
- Public Accounts
Provincial Priorities for Improvement
Government Directions
- 3-Year Plan for Learning System
- Provincial Directions for Planning and Reporting
- Funding Announcement

Each level in the Accountability Framework plays a key role.

Government of Alberta – sets overall provincial direction and allocates budget for ministries; monitors and reports on progress, and uses results to plan improvements.

Alberta Learning – prepares three-year business plan and guidelines for learning system plans based on provincial direction; reports annually on results and uses results to plan improvements; identifies provincial priorities for improvement; allocates funds to school boards and post-secondary institutions; defines basic education; reviews school board and post-secondary plans and results to identify implications for provincial level planning.

School Boards – plan and implement three-year education plans aligned with ministry direction; allocate resources to schools and programs; monitor progress; report annually to stakeholders and use results to plan improvements.

Schools – plan and implement three-year education plans aligned with school board direction, monitor progress, report annually to stakeholders and use results to plan improvements.

References:

- Legislative Authority, Appendix 1
- Definition of Basic Education, Appendix 2
- Alberta Learning's Three-Year Business Plan for 2001/02 to 2003/04 will be available on the Ministry's website upon release.

III. School Board and School Planning

School boards and schools build and maintain plans on a three-year timeframe. They update plans annually so that as one year is completed and another is added, the plan continues to roll forward. They update three-year plans in response to recent performance results and changes in the operating environment. Although entirely new plans are rarely prepared, school boards and schools update some components of their plan on an annual basis, such as strategies and priorities. Every few years, they revisit and refresh their vision, mission and beliefs, e.g., at the beginning of a board's mandate.

Preparing and Updating Plans

School boards and schools annually update three-year education plans based on the principle of continuous improvement and take into account a number of considerations, including:

- school board and school results;
- input from stakeholders such as school councils, parents and the public;
- resources available;
- Alberta Learning three-year plan and annual results; and
- feedback from Alberta Learning.

School board and school three-year plans build on Alberta Learning's vision, mission and goals for lifelong learning. School boards and schools adapt goals and outcomes **required** by the province and incorporate local goals and outcomes to reflect their unique characteristics and circumstances.

Communication

School board and school three-year education plans can serve as a valuable tool for communicating with school and board staff, school councils, parents and other key community groups. School boards and schools publish highlights of their plans to inform parents and public of their goals, plans, results and priorities for improving education for students, and for the use of facilities and resources.

Publication and notification requirements for school board plans, Link 1

Alberta Learning staff review school board plans and annual results reports to ensure alignment with provincial goals and to provide input into provincial-level planning for the learning system. Reports highlighting the findings from the review and analysis are prepared. These reports are posted on the Ministry's website at http://www.learning.gov.ab.ca/educationsystem/edplans1999-analysis.pdf.

Elements of Education Plans

Each school board's and school's three-year education plan is built on a three-year timeframe and includes a number of elements, some of which are **required** by Alberta Learning.

Foundation statements, such as vision, mission, principles and/or beliefs articulate the board's purpose. Contextual information such as a jurisdiction profile or issues and trends affecting operations describe the planning environment. Alberta Learning **requires** that education plans include specific provincial priority areas for improvement along with a rationale, as well as goals and related outcomes, performance measures, targets and strategies. As well, Alberta Learning **requires** evidence of integrated planning in the form of highlights of specific related plans, such as capital, technology, financial, and highlights of intended use of funding for provincial initiatives.

These elements of education planning, described briefly below, combine to form an education plan that shows stakeholders where the school board is going, how it plans to get there, how it will measure progress and what resources it will use along the way. Required elements are labeled.

Foundation Statements

Vision

A vision looks to the future. It describes a set of ideal circumstances that school boards strive to achieve. These ideals focus on student achievements and the programs or services that maximize student accomplishments.

School boards reflect Alberta Learning's vision for the provincial learning system - Optimizing human potential - through their vision statements.

Mission

A mission statement is a clear, concise description of the school board's overall purpose and role. It gives direction to the programs and services that a school board provides for its students. A school board's mission is consistent with Alberta Learning's mission:

> Alberta Learning's leadership and work with partners builds a globally recognized lifelong learning community that enables Albertans to be responsible, caring, creative, self-reliant and contributing members of a knowledge-based and prosperous society.

Principles and/or Beliefs

Alberta Learning has established principles for the learning system: learner-centred, accessible, collaborative, accountable, responsive, innovative and equitable. These would be reflected in the school board's statements as well as their own organizational

beliefs. The board's principles or beliefs statements guide decision-making and provide a foundation for developing its mission, vision and goals.

Contextual Information

Profile

A profile is a brief description of the school jurisdiction and school that gives context for the plan. Profiles describe characteristics of communities, students, programs and locations.

Issues and Trends

Issues and trends help school boards identify opportunities and challenges that may impact planning, budgeting, assessing and reporting. An issue is a condition that may affect the board's ability to fulfill its mandate or to achieve its goals. A trend shows a direction of results over time.

Priority areas for improvement [required]

Priority areas for improvement reflect local and province-wide priorities that require immediate, concerted attention. Reviewing annual performance results is an important basis for selecting priorities in areas where results do not meet expectations. Selecting and addressing priorities for improvement are essential aspects of the accountability cycle for continuous improvement in Alberta's basic learning system.

Required Provincial Priorities for Improvement, Link 2

Goals and Related Components

Goals [required]

Goals are broad statements that look towards the long term and steer organizations in the direction of realizing their vision. They are often expressed as desired conditions or aims. School board goals reflect Alberta Learning's goals that guide the direction of the learning system overall as well as address local needs and circumstances.

Outcomes [required]

Outcomes are measurable statements of what school boards seek to achieve. In broad terms, they answer the question: "What will this look like when we get to where we want to be?" Additional outcomes focus on local need and circumstance. Each goal **requires** at least one outcome.

Required Goals and Outcomes for School Board Plans, Link 3

Performance Measures and Targets [required]

Performance measures are the assessment tools that school boards use to track how far along they are in achieving the outcomes in their plan. Education plans include at least one measure for each outcome; conversely, one measures can address more than one outcome. Measures can be quantitative or qualitative. Quantitative measures are expressed in "numbers of" or "percentages of".

School boards list in their plans the measures they will use to assess and report their results, as well as past results for these measures, if available. These measures include the **required** provincial measures, locally-determined measures for provincial and board priorities for improvement, and any other local measures. The provincial measure for the provincial priorities for improvement are provided as examples for school boards.

Provincial Measures and Results for Priority Areas for Improvement, Appendix 3

Targets are strategic tools to help school boards and schools focus on maintaining or improving results. Targets show desired levels of performance to be attained by a certain time. Targets are **required** for the provincial student achievement measures.

Requirements for Performance Measures and Targets, Link 4

References

Performance Measurement, Appendix 4

Setting Local Targets for Student Achievement, Appendix 5

Conducting Surveys, Appendix 6

Strategies [required]

Strategies are actions that school boards take to achieve goals and desired outcomes. School boards are **required** to develop strategies for each goal to achieve outcomes and to address provincial and local priorities for improvement, to reflect specific funded initiatives (e.g, Early Literacy, English as a Second Language, Student Health, students with special needs, Alberta Initiative for School Improvement), and to deal with local issues, trends and opportunities.

Highlights of Integrated Planning

School board planning in specific areas, such as facilities plans, technology plans, teacher/staff in-service plans and financial plans contribute to the achievement of the board's education plan. Similarly, boards' plans for the use of funding for provincial initiatives (e.g., Early Literacy, students with special needs, Student Health, English as a Second Language, and Alberta Initiative for School Improvement) contribute to improving student results.

Highlights of Related Plans and Funded Initiatives [required]

In this section of the education plan, boards highlight for their stakeholders key projects in each of the next three years, reflecting on the needs and intended results for students, of their related plans and how these projects support the education plan.

Requirements for highlights of related plans and funded initiatives, Link 5

Budget Highlights [required]

Budget highlights present summarized information from the board's budget for the first year of the three-year plan in easy-to-understand terms for parents and the public. These highlights indicate how the budget supports the plan and how the board allocates resources, e.g., administration, instruction, operations, maintenance and capital. School boards also include information on how detailed budget information can be obtained.

School Planning

School education plans are the tools that school boards and schools use to ensure continuous improvement. And, because school plans also address provincial goals and board direction, they help ensure the entire basic learning system is focused on key improvements and the educational needs of Alberta students.

School plans are based on a three-year cycle and updated annually to incorporate school board direction and local input, and to address areas for improvement identified from results. Plans indicate how progress will be measured and enable critical reflection and continuous improvement. As well, school plans are a primary way for schools to ensure communication with their community.

School plans reflect provincial and board direction, local needs and the advice of school councils. School plans contain the **required** learning system goals and measures as well as their own goals, outcomes, measures and strategies schools develop to address the needs of their students.

Required goals, outcomes and measures for school plans, Link 6

Further information on elements of an education plan is available in the Elements of Education Plans section of this guide.

(Link back to Planning Elements section.)

IV. Results Reporting

School boards and schools report annually on their progress and achievements and use the information to identify improvements to address in their updated plan. Every few years boards may wish to undertake a major retrospective by assessing accomplishments over a longer span of time, e.g., at the end of a board's mandate, in preparation for a major direction-setting exercise of the next board.

School Board Reporting

Each year school boards report on the progress of their three-year education plans through an Annual Education Results Report (AERR). The results are the primary tool that school boards use to continually improve their three-year education plans because they provide information on areas where performance is strong and identify areas that need improvement. In short, it allows school boards to practice results-based decision-making.

The annual results report also tells stakeholders where the school board is in relation to where it wants to be. It demonstrates that the school board is accountable for student achievement and for the wise use of resources to provide quality programs for students and to address improvement priorities.

Communication

AERRs provide school boards and schools the opportunity to highlight their accomplishments in addition to including the **required** reporting and analysis of performance measures.

AERRs are public documents. School boards and schools also communicate results to their community through newspaper inserts, brochures, etc.

Publication and notification requirements, Link 1

Alberta Learning staff review school board AERRs to ensure alignment with provincial goals and to provide input into provincial-level planning for the learning system. Reports highlighting the findings from the review and analysis are prepared and published. These reports are available on the Ministry's website at http://www.learning.gov.ab.ca/educationsystem/results1998-analysis.pdf

Elements of Annual Education Results Reports

Listed below are the elements typically found in a school board AERR. Those elements required by Alberta Learning are labeled.

Highlights of Education Plan Accomplishments

This section of the Annual Education Results Report (AERR) gives school boards the opportunity to provide descriptive information about their progress and accomplishments in implementing their three-year education plan. It highlights the board's accomplishments during the past year, such as the introduction of new program for students or the focus of teacher in-service programs. Boards also can include descriptions of student and community characteristics as well as circumstances affecting operations and results achieved.

Performance Measures Results [required]

In this section school boards provide results information for the performance measures in the school board three-year plan for the **required** student achievement measures and local measures, including those selected to assess provincial priorities for improvement. School boards use the results to analyze and assess their progress. Contextual information can be provided to explain results and describe the environment in which results were achieved. This qualitative information enhances understanding of quantitative results and contributes to the overall assessment of progress and achievement.

Requirements for reporting on student achievement, Link 7

Provincial results on measures related to the provincial priorities for improvement are provided in Appendix 3 as examples for school boards. If boards use corresponding local measures, they can compare their performance with the provincial results.

Provincial results for priorities for improvement, Appendix 3

Future Challenges [required]

This section of the AERR describes major issues, concerns and priorities for the school board for the next few years, including priorities for improvement identified from the assessment of results. It also discusses emerging issues and trends that have implications for the school board.

Highlights of Related Plans and Initiatives [required]

Implementation of related school board plans such as human resource, capital, financial and technology plans during the school year contribute to the overall achievement of the education plan, as does the board's use of funding for provincial initiatives. In this section of the AERR, school boards highlight progress on or results achieved on projects in these related plans over the past year and briefly explain how these have supported or enhanced learning for students.

Requirements for Highlights of Related Plans and Provincial Initiatives, Link 8

Financial Summary [required]

In the financial summary, school boards provide a brief overview of their spending for the previous year based on the Audited Financial Statement (AFS), including spending per student per year in total and by program area, as outlined in Schedule A of the AFS. This information is presented clearly and concisely in a table or graph format for the primary audience - parents and other members of the community. School boards also indicate how readers can access detailed expenditure information.

School Reporting [required]

Schools report annually to parents and their communities on student achievement and use of resources. The reports include the results information on all performance measures in the school's plan, including **required** student achievement measures, as well as other information at the discretion of the school and boards.

School Achievement Reporting Requirements for Schools, Link 9

V. Links

Link 1
Publication and Notification Requirements

Three-year education plans and Annual Education Results Reports are public documents, approved by the school board, which are available for public review.

Education Plans

Three-year plans are updated by May 31 of each year and posted on the jurisdiction's website. School boards notify Alberta Learning of the website posting at field.services@learning.gov.ab.ca. Alternatively, school boards provide a copy of their plan as an e-mail attachment to the appropriate Field Services zone director.

School boards are also **required** to ensure the complete three-year education plan and the Budget Report for the first year of the plan are available to the public upon request.

Results Reports

The Annual Education Results Report (AERR) is prepared and posted on the school jurisdiction website by November 30 of each year. School boards notify Alberta Learning of the website posting at field.services@learning.gov.ab.ca. Alternatively, school boards provide a copy of their AERR as an e-mail attachment to the appropriate Field Services zone director.

School boards are also **required** to ensure the complete AERR and the Audited Financial Statement are available to the public upon request.

Link 2
Required Provincial Priority Areas for Improvement, 2001/02 to 2003/04

Priorities for improvement are important outcomes where performance does not meet expectations. School boards develop strategies for their plan to address provincial and local priorities for improvement based on their results. Listed below are the **required** provincial priorities for improvement for the basic learning system related to provincial goals and outcomes. School boards can address the priorities that relate to more than one goal or outcome with measures and strategies in whichever of the goals and outcomes they determine is most appropriate. Provincial results for measures related to the priorities for improvement are provided as examples in Appendix 3.

Priority Areas for Improvement and Related Goals

- **Improving community satisfaction with education**
  Related to all Goals and Outcomes

- **Improving coordination of services for children**
  Related to Goal One - High Quality Learning Opportunities
  Outcomes: The learning system is responsive - the learning system meets the needs of all learners and society.
  The learning system is flexible and provides a variety of programs and modes of delivery.
  The learning system is accessible - all Alberta students can participate in learning.

  Related to Goal Four - Effective Working Relationships with Partners
  Outcomes: Effective partnerships meet the learning needs of Albertans.
  Joint initiatives contribute to the achievement of the social and economic goals of the province.

- **Increasing high school completion rates**
  Related to Goal Two - Excellence in Learner Achievement
  Outcome: Learners complete programs.

- **Improving secondary student achievement in mathematics**
  Related to Goal Two - Excellence in Learner Achievement
  Outcome: Learners demonstrate high standards.

- **Improving access to information technology**
  Related to Goal One - High Quality Learning Opportunities
  Outcome: The learning system is flexible and provides a variety of programs and modes of delivery.

  Related to Goal Three - Well Prepared Learners for Lifelong Learning, World of Work and Citizenship
  Outcomes: Albertans are able to learn continuously.
  Learners are prepared for work.

Link 3
Required Goals and Outcomes for School Board Plans 2001/02 to 2003/04

Listed below are the learning system goals and outcomes that are **required** to be incorporated in school authority three-year plans. The learning system outcomes, which apply across the entire learning system may be interpreted, and contextualized, by school boards to reflect their ECS-12 mandate, local needs and circumstances. For example, the applicable school board outcome statement for "learners complete programs" could be restated as "students complete high school". These goals and outcomes are reviewed annually in the Ministry's business planning process, which includes consultation with stakeholders.

Goals	Learning System Outcomes
Goal 1: High Quality Learning Opportunities*	• The learning system is responsive - the learning system meets the needs of all learners and society. • The learning system is flexible and provides a variety of programs and modes of delivery. • The learning system is accessible - all Alberta students can participate in learning. • Financial need is not a barrier to learners participating in learning opportunities. • The learning system is affordable.
Goal 2: Excellence in Learner Achievement	• Learners demonstrate high standards. • Learners complete programs.
Goal 3: Well Prepared Learners for Lifelong Learning, World of Work and Citizenship	• Children start school ready to learn. • Albertans are able to learn continuously in school, at work and in society. • Learners are well prepared for work. • Learners are well prepared for citizenship.
Goal 4: Effective Working Relationships with Partners	• Effective partnerships meet the learning needs of Albertans. • Joint initiatives contribute to the social and economic goals** of the province.

* School boards may choose to add to this goal an outcome and corresponding measure(s) and strategy(ies) relating to high quality teaching.

** Selected Social Goals: Our children will be well cared for, safe, successful at learning and healthy; Alberta students will excel.
Selected Economic Goals: Alberta will have a prosperous economy; Our workforce will be skilled and productive; Alberta businesses will be increasingly innovative.

Link 4
Required Student Achievement Performance Measures and Targets for School Board Plans, 2001/02 to 2003/04

The **required** performance measures and targets listed below are to be included in school board three-year plans along with results for the past five years, if available. These measures relate to the outcome "Learners demonstrate high standards" for the goal - Excellence in Learner Achievement - in school board plans.

- Percentages of students (excluding those in home education programs) who achieve the acceptable standard and the standard of excellence on provincial achievement tests in Grades 3, 6 and 9 (five years of results), based both on those writing and the cohort (total enrollment in grade) in relation to provincial results, provincial standards* and targets school boards set for the end of the plan period, 2003/04.

  Setting one-year targets for 2001/02 is optional.

- Performance of students in a home education program in Grades 3, 6 and 9 in mathematics and language arts, both for those writing and those not writing provincial achievement tests.

- Performance of students who are absent from the grades 3, 6, and 9 provincial achievement tests (measure being piloted in June 2001 for implementation in June 2002).

- Performance of students in the Integrated Occupational Program (measure being piloted in June 2001 for implementation in June 2002).

- Percentages of students who achieve the acceptable standard and percentages who achieved the standard of excellence on diploma examinations. (The five-year diploma exam trend data for school authorities should be based on the difference between the school jurisdiction and provincial results relative to the three-year targets school boards set for the end of the plan period, 2003/04. Results for Applied Math 30 and Mathematics 33 are excluded for 2001/02, and this is the first year to report results for Pure Math 30.)

  Setting one-year targets for 2001/02 is optional.

- Student participation in diploma exam courses.

The Learner Assessment Branch provides school authorities with multi-year reports on student results and participation on provincial achievement tests and diploma examinations. Boards include this information in their plans and use it for setting one-year (optional) and three-year **(required)** targets for these measures.

* Provincial standards: 85% of students writing are expected to achieve the acceptable standard and 15% are expected to achieve the standard of excellence.

Link 5
Requirements for Highlights of Related Plans and Funded Initiatives

School board plans in specific areas are integral to the achievement of their three-year plans, as are their plans for using funds received for provincial initiatives.

In this section, boards highlight the key projects for each of the next three years, including rationale and intended results for students of the following funded initiatives:

- Early Literacy (ELI)
- English as a Second Language (ESL)
- Students with Special Needs
- Student Health
- Alberta Initiative for School Improvement (AISI)

and of the following specific plans:

- three-year capital and long-range facilities plan
- technology plan
- teacher in-service/professional growth plan
- other (e.g., transportation plan, human resource plan)

Link 6
Required Goals and Measures for School Plans

School plans are **required** to include the four provincial goals (listed below) for Alberta's learning system. These provincial goals can be restated, and contextualized, by the school to reflect the school's focus in the ECS-12 system.

Provincial Goals:

Goal 1 High Quality Learning Opportunities

Goal 2 Excellence in Learner Achievement

Goal 3 Well Prepared Learners for Lifelong Learning, World of Work and Citizenship

Goal 4 Effective Working Relationships with Partners

For Goal 2 above, the following performance measure is **required**.

- Student results and three-year targets for provincial achievement tests and diploma examinations. One-year targets are optional.

Specifically:

- Percentages of students writing grades 3, 6 and 9 provincial achievement tests who achieve the acceptable standard and percentages who achieved the standard of excellence (five years of results) in relation to school three-year targets, provincial results and provincial standards*.

- Percentages of students writing grade 12 diploma examinations who achieved the acceptable standard and the percentages who achieve the standard of excellence. (The five-year diploma exam trend data for schools should be based on the difference between the school and provincial results relative to the three-year targets schools set for the end of the plan period, 2003/04. Results on Applied Mathematics 30 and 33 results are excluded for 2001/02, and this is the first year to report results for Pure Mathematics 30.)

* Provincial standards: 85% of students writing are expected to achieve the acceptable standard and 15% are expected to achieve the standard of excellence.

The Learner Assessment branch provides multi-year reports by school board and school on student achievement and participation on provincial achievement tests and diploma examinations that schools can use in their three-year plans.

Link 7
Requirements for School Board Reporting on Student Achievement, for November 2002 AERR

Listed below are the performance measures **required** to be reported in School Board Annual Education Results Reports. They provide information related to the outcome "students achieve high standards" for the goal Excellence in Learner Achievement in the board's three-year plan.

- Percentages of students (excluding those in home education programs) who achieved the acceptable standard and percentages of students who achieved the standard of excellence on provincial achievement tests in grades 3, 6 and 9 (five years of results) based both on those writing and the cohort (total enrollment in grade) in relation to school board targets, provincial results and provincial standards*.

- Performance of students in a home education program in grades 3, 6 and 9 language arts and mathematics for both those who wrote provincial achievement tests and those who did not write.

- Performance of students who were absent from the grades 3, 6 and 9 provincial achievement tests (measure being piloted in June 2001 for implementation in June 2002).

- Performance of students in the Integrated Occupational Program (this measure is being piloted in June 2001 for implementation in June 2002).

- Percentages of students who achieved the acceptable standard and percentages who achieved the standard of excellence on diploma examinations. (The five-year diploma exam trend data for school boards should be based on the difference between the school jurisdiction and provincial results relative to the three-year targets school boards set for the end of the plan period, 2003/04. Results for Applied Math 30, Mathematics 33 are excluded for 2001/02 and this is the first year to report results for Pure Math 30.)

- Student participation in diploma examination courses.

The Learner Assessment Branch provides multi-year reports by school and schools boards on student achievement and participation on provincial achievement tests and diploma examinations. This information can be used to report to the public on the above measures.

* Provincial standards: 85% of students who wrote are expected to achieve the acceptable standard, and 15% are expected to achieve the standard of excellence.

Link 8
Highlights of Accomplishments - Related Plans and Initiatives

Implementation of board plans in specific areas and use of funds related to specific provincial initiatives contribute to the achievement of the three-year education plan.

In this section of the AERR, boards highlight their progress and results over the past year, including how student learning has been enhanced for the following provincial initiatives:

- Early Literacy (ELI)
- English as a Second Language (ESL)
- Students with Special Needs
- Student Health
- Alberta Initiative for School Improvement (AISI)

and for specific plans, including:

- capital and facilities plans
- technology plan
- teacher growth/in-service plans
- other (e.g., human resources, transportation)

Link 9
Student Achievement Reporting Requirements for Schools

Schools report results on all performance measures in their education plans, including the **required** provincial measure - student results on provincial achievement tests and diploma examinations - for the learning system goal: Excellence in Learner Achievement, as follows:

- Percentage of students writing provincial achievement tests in grades 3, 6 and 9 who achieved the acceptable standard and the percentage who achieved the standard of excellence (five years of results) in relation to school targets, provincial results and provincial standards*.

- Percentage of students writing grade 12 diploma examinations who achieved the acceptable standard and the percentage who achieved the standard of excellence. (The five-year diploma exam trend data for schools should be based on the difference between the school and provincial results relative to the three-year targets schools set for the end of the plan period, 2003/04. Results on Applied Mathematics 30 and 33 results are excluded for 2001/02, and this is the first year to report results for Pure Mathematics 30.)

* Provincial standards: 85% of students writing are expected to achieve the acceptable standard and 15% are expected to achieve the standard of excellence.

The Learner Assessment Branch provides multi-year reports by school and schools boards on student achievement and participation on provincial achievement tests and diploma examinations. This information is used to report to the public on the above measures.

VI. Appendix 1
Legislative Authority

The provincial government has developed a comprehensive concept of accountability which expanded the focus from accounting for dollars spent to include accounting for results achieved. Accountability for performance involves developing plans to make best use of resources available, assessing results to determine if expectations are being met, identifying where improvement is needed, and reporting the results to the public.

This expanded concept of accountability, applying to government departments and funded agencies and organizations, was established in legislation in 1995. The Government Accountability Act (GAA) requires government departments and school boards as well as other public agencies to prepare plans and report on results.

The accountability cycle for the basic learning system (*Accountability in Education – Policy Framework,* June 1995) was developed to describe the application of government's comprehensive concept of accountability to the ECS-12 system. This cycle focuses on continuous improvement and on the linkage of school board plans and reports to each other and to provincial directions for the learning system, as reflected in the School Authority Accountability Policy, 2.1.1 (*Policy, Regulations and forms Manual,* on-line at http://www.learning.gov.ab.ca/educationguide/pol-plan/polregs/toc.asp).

A variety of documents essential for school system operations are available on the department's website, such as the three-year business plan for the learning system, the Guide to Education, the Program of Studies and the Funding Manual. The Government Accountability Act and the School Act are available on the Queen's Printer website linked from the on-line Policy Manual Table of Contents, or at http://www.gov.ab.ca/qp/index.html.

Alberta Learning's website also provides information to enhance board planning and reporting, such as the provincial surveys of parents, high school students and the public, and the summaries of the reviews of school board plans and AERRs.

Appendix 2
Basic Education in Alberta – The Definition

(Ministerial Order No. 004/98)

A basic education must provide students with a solid core program including language arts, mathematics, science and social studies. Students will be able to meet the provincial graduation requirements and be prepared for entry into the workplace or post-secondary studies. Students will understand personal and community values and the rights and responsibilities of citizenship. Students will develop the capacity to pursue learning throughout their lives. Students also should have opportunities to learn languages other than English and to attain levels of proficiency and cultural awareness which will help to prepare them for participation in the global economy.

Student Learning Outcomes

Students are expected to develop the knowledge, skills and attitudes that will prepare them for life after high school. A basic education will allow students to:

- Read for information, understanding and enjoyment.
- Write and speak clearly, accurately and appropriately for the context.
- Use mathematics to solve problems in business, science and daily-life situations.
- Understand the physical world, ecology and the diversity of life.
- Understand the scientific method, the nature of science and technology, and their application to daily life.
- Know the history and geography of Canada and have a general understanding of world history and geography.
- Understand Canada's political, social, and economic systems within a global context.
- Respect the cultural diversity and common values of Canada.
- Demonstrate desirable personal characteristics such as respect, responsibility, fairness, honesty, caring, loyalty, and commitment to democratic ideals.
- Recognize the importance of personal well-being and appreciate how family and others contribute to that well-being.
- Know the basic requirements of an active, healthful lifestyle.
- Understand and appreciate literature, the arts and the creative process.
- Research an issue thoroughly and evaluate the credibility and reliability of information sources.

- Demonstrate critical and creative thinking skills in problem solving and decision making.
- Demonstrate competence in using information technologies.
- Know how to learn and work independently and as part of a team.
- Manage time and other resources needed to complete a task.
- Demonstrate initiative, leadership, flexibility, and persistence.
- Evaluate their own endeavours and continually strive to improve.
- Have the desire and realize the need for life-long learning.

Standards for Student Learning

The Minister of Education defines acceptable standards and standards of excellence for student achievement in consultation with Albertans. Employers are involved in specifying the knowledge, skills and attitudes needed in the workplace. Schools, school authorities and the Minister of Education assess and report regularly to the public on a range of student learning.

The school's primary responsibility is to ensure that students meet or exceed the provincial standards as reflected in the Student Learning Outcomes (outlined above), the Alberta Programs of Study, provincial achievement tests, diploma examinations and graduation requirements.

Education Delivery

Schools must engage students in a variety of activities that enable them to acquire the expected learnings. Schools have authority to deploy resources and may use any instructional technique acceptable to the community as long as the standards are achieved. Schools, teachers and students are encouraged to take advantage of various delivery options including the use of technology, distance learning and the workplace.

Schools play a supportive role to families and the community in helping students develop desirable personal characteristics and the ability to make ethical decisions. Schools also help students take increasing responsibility for their learning and behaviour, develop a sense of community belonging and acquire a clearer understanding of community values and how these relate to personal values.

Students learn basic, transferable knowledge, skills and attitudes in school. Schools, in co-operation with employers, provide opportunities for students to develop and practice employability skills. The Minister of Education provides credit for off-campus learning that is approved and accepted by the school and the employer. Government works with schools, employers and post-secondary institutions to help young people make a smooth transition to work and further study.

Appendix 3
Provincial Results for Measures for the Provincial Priority Areas for Improvement

Listed below are the results for provincial performance measures related to the required provincial priority areas for improvement. These measures are provided as examples. School boards identify appropriate measures for these priorities in their three-year plans. If the board's measures correspond to these provincial measures, boards can also report their results in relation to provincial results in their plans and AERRs.

Priority: Improving public satisfaction with education.

- Percentage of the public satisfied with quality of education in schools.

1997/98	1998/99	1999/2000	Target 2002/03
70%	66%	68%	75%

Priority: Improving coordination of services for children with special needs.

- Percentage of parents of children with severe special needs who are satisfied with services for their child.

1997/98	1998/99	1999/2000
79%	78%	76%

Priority: Increasing high school completion rates.

- Percentage of students who completed high school within six years of Grade 9.

1995/96	1996/97	1997/98	1998/99	1999/2000	Target 2002/03
69%	69%	70%	70%	71%*	75%

* preliminary

Priority: Improving secondary student achievement in mathematics*.

- Percentage of students who achieved the acceptable standard on the Grade 9 provincial achievement test in mathematics and the percentage who achieved the standard of excellence.

	1997/98	1998/99	1999/2000	Standard
Grade 9 writing				
- Acceptable	72%	72%	74%	85%
- Excellence	14%	15%	16%	15%
Grade 9 enrolled				
- Acceptable	64%	64%	67%	--
- Excellence	13%	14%	14%	--

* With the phase-in of Pure Math 30 and Applied Math 30, comparable results for grade 12 students in prior years are not available.

Priority: Improving students' access to information technology.

- Percentage of students and parents who report school helps improve students' computing skills.

	1995/96	1996/97	1997/98	1998/99	1999/2000
Students	65%	62%	64%	70%	69%
Parents	--	--	67%	80%	79%

- Student/instructional computer ratio.

1997/98	1998/99	1999/2000
8.6	7.7*	6.7*

* preliminary

Appendix 4
Performance Measurement

Performance measures in school board plans and results reports provide information on achievement of outcomes on key aspects of the education system. This information is an essential part of accountability that enables the jurisdiction to:

- assess and report on progress, what's working well, what needs improvement
- determine priorities for improvement and set improvement targets
- make program and budget decisions to maintain good performance and improve performance in areas requiring improvement.

Measures typically provide quantifiable information on key aspects of education. This information is generated quantitatively through tests and data analysis or through qualitative means, such as observation, interviews, portfolio reviews. Whether quantitative or qualitative, measures demonstrate observable change.
To be meaningful, measures information is obtained regularly (e.g., annually) and is normally expressed in percentages, ratios, or numbers in relation to a total.

Types of Performance Measures

- **Outcome measures:** provide information on progress toward desired results in key areas - effectiveness of programs, impacts on clients.

  The measures in school board plans and results reports focus on outcomes and constitute the core set for assessing and reporting on progress and achievement.

  Other types of measures, listed below, are important for managing resources, providing programs and services and reporting contextual information:

- **Intermediate outcome measures**: For some desired outcomes, results may not be known for several years. In such instances, it is useful to measure intermediate steps – milestones or landmarks - toward the desired outcome.
- **Output measures**: information on number of clients served and types of services provided.
- **Process measures**: information on activity and efficiency. These measures indicate demand for services and cost per unit of providing service.
- **Input measures**: information on resources allocated to programs, such as funding, personnel, equipment. These measures provide information on cost of providing programs and services.

Characteristics of good performance measures

Good performance measures provide information that is:

- Understandable – clear and sufficient to provide an understanding of the organization or system to staff, community and government
- Valid – meaningful and credible (sound, defensible)
- Relevant and appropriate – timely, related to important aspects
- Reliable – unbiased, error free and verifiable
- Comparable – show change over time and/or among similar organizations
- Discrete – provides information in distinct, non-overlapping categories
- Empowering – useful for decision making, promote improvement
- Practical – can be reliably assessed with reasonable effort

References:

Alberta Treasury, *Measuring Performance: A Reference Guide*, September 1996. On the internet at http://www.treas.gov.ab.ca/publications/measuring/measupgu/pfmguide.pdf Click on Performance Measurement Home page.

Alberta Auditor General, *Government Accountability*, February, 1997. On the internet at http://www.oag.ab.ca/. Click on the Reading Room.

Appendix 5
Setting Local Targets for Student Achievement

Targets and Planning

A target is a desired level of measurable or observable performance to be attained by a specified time. Targets are an implicit part of any goal. While a school's or school authority's educational goals point out the directions for people's efforts, targets describe in specific terms what will be accomplished by a certain time. This allows staff to assess whether they are heading where they intended to go, and how well they are moving toward their desired outcomes. Assessment of progress in relation to a target may also lead to the recognition that a different target would be more helpful in guiding your school's or school authority's efforts toward a particular goal. By identifying immediate, reachable outcomes, targets encourage teachers, students, administrators, and their community to believe that distant goals are attainable.

Viewed in this way, targets can be a valuable part of your school or school authority plan. Your mission, mandate, values and beliefs, and long-range goals all provide a context for setting specific targets. Similarly, past achievement levels are helpful indicators of what specific targets may be most appropriate. This is why achievement test and diploma examination results, as well as results of various other local assessments, are relevant in target setting.

Local Focus

Quantitative targets for student achievement on the provincial achievement tests and diploma examinations are **required** in school and school authority education plans. School authority targets provide a framework for each school in the school authority to use in setting school targets. School authority targets will be most helpful if they take into account the variations in overall student achievement from school to school.

Systematic interpretation of school results from provincial achievement tests and diploma examinations will reveal where students need more help in order to continue learning successfully. This can be the beginning point for setting school authority and school targets for student performance on the tests for the next year or two.

Local targets should be realistic and achievable, based on past performance. It is possible that local targets would be different from provincial standards. Staff in each school will be able to identify what percentage of their students reasonably can be expected to achieve the provincial standard in a particular test or examination within the time specified in the targets. An important part of this decision is agreeing on how financial and human resources can support the targets.

Tips for Setting Local Targets

- Consider past and desired participation rates in achievement tests and diploma examinations.
- Prioritize to focus on areas needing improvement. For example, emphasize subjects needing improvement in student performance are across grades. It may be reasonable to set "hold the line" targets to maintain current levels of performance in other areas temporarily while directing attention to the selected areas.
- Set targets in relation to other targets. It is important to ensure that achievement of one target does not jeopardize the achievement of another. For example, student participation rates for achievement tests and diploma examinations should not decrease because of a desire to improve school or authority results.
- Work collaboratively across grades in a school. Students' performance on an achievement test or diploma examination reflects their learning over the years. Teachers in all grades can contribute important insights and assistance in setting targets.
- Use the school reports on achievement test or diploma examination results to identify what aspects of a subject or course need attention, and use this information to plan targets.
- Emphasize what students need, in order to succeed, rather than focusing on problems that keep students from achieving at the levels expected provincially.
- Expect to set different targets in different grades and subjects/courses, depending on past results and current priorities and resources.
- Work collaboratively at the jurisdiction level, to identify areas of common strength or areas for improvement across different schools and to determine targets for the district that can encourage all schools.
- Interpret targets to students and parents so that they are part of the school-wide effort to achieve targets.
- Report to students and parents on student achievement in relation to targets.

Targets in Perspective

Provincial tests, though providing a common standard and important information about students' learning, are only one of many measures for evaluating the effectiveness of schools and school authorities.

School authorities and individual schools may find it helpful to set targets for other indicators of student achievement, and for areas other than student achievement.

Examples include:

- completion of programs
- satisfaction reported by students or parents
- involvement of parents or others from the community in schools
- student involvement in the community or in extra curricular activities.

These other targets can either be quantitative (e.g., "by 2003, 80% of students") or qualitative (e.g., "improve..." or "maintain...").

Through its targets, each school authority or school, together with parents and members of the community, can highlight priorities that exist locally for a given year and commit to achieving certain results.

Insofar as target setting complements other strategies for improving student learning, your targets are likely to contribute to student learning and to the overall effectiveness of schooling in your community.

Appendix 6
Conducting Surveys

Some local measures may require surveys of parents, students, staff and other community members.

To be manageable, surveys can be done on a random sampling basis or rotated among schools or stakeholder groups over a three-year period.

If boards use the same questions as are used in Alberta Learning's annual surveys of a stratified random sample of parents, students and the public, local results can be considered in relation to provincial results. The questions asked in the Ministry's surveys of students, parents and the public are available on the Internet at http://www.learning.gov.ab.ca/educationsystem/satisfaction/default.asp.

While surveys do not have to be done annually, the latest available survey information should be reported in the AERR each year along with trend data (information on the same questions from surveys done in previous years), if available.

The Alberta Auditor General's Office has prepared a resource on conducting surveys for the Alberta public sector: *Client Satisfaction Surveys*, October 1998. This document is available on the internet http://www.oag.ab.ca.

Two resources were prepared for the Ministry in 1995 to provide guidance to school jurisdictions on conducting satisfaction surveys:

- Environics West, *Pilot Project Report:* This report compares two methods of conducting surveys of parents, teachers and students: telephone interviews and mailed, self-administered questionnaires (http://www.learning.gov.ab.ca/educationsystem/satisfaction/PilotProjectReport.pdf).

- Environics West, *Telephone and Self-Completed Satisfaction Surveys: Training Manual:* This manual provides advice on selecting samples and conducting telephone and mailed surveys (http://www.learning.gov.ab.ca/educationsystem/satisfaction/Interviewing_Manual.pdf).